WCMS 3 site migration remediation instructions

# This content is current as of: February 22nd, 2023

# Task overview

After the migration is complete, you will conduct a comparison check of each published item (web pages, web forms, footers, etc). Remediate (correct) any discrepancies to ensure parity between the original WCMS 2 site and the WCMS 3 staging site. We provide a Site Migration Remediation spreadsheet found on the [WCMS 3 site migration remediation training page](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-migration-remediation-training) as a recording tool.

Reach out to wcms@uwaterloo.ca with any questions or to report a new issue, and the migration specialist team will be happy to help.

# Steps

1. Save a copy of the Site Migration Remediation spreadsheet found on the [WCMS 3 site migration remediation training page](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-migration-remediation-training). This spreadsheet is a resource to record the comparison check and remediation details for your supervisor to review. We suggest using the naming convention: **Name-of-site-migration-check.**
2. Fill out the top of the migration template. Check with your supervisor if there is any other information they wish to include on the spreadsheet.
3. Only published items are migrated. To view or download the list of published item titles from WCMS 2:
	* 1. In the Administration Bar > Dashboard > Site Management > Content report (CSV). **Note**: Only site managers have access to this report. If you are not a site manager, speak to your supervisor to gain access.
		2. Sort the “Published” column A-Z. [If prompted, expand selection to prevent data from getting mixed up.]
		3. Copy the titles of all the published items into the migration remediation workbook.
4. **Make sure menu items are in the same order as the original site**. Please reference [How to remediate menu order](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-menu-order) for in-depth instructions.

**Note:** Some menu items have different names in WCMS 3 compared to WCMS 2.

|  |  |  |
| --- | --- | --- |
| **WCMS 2** |  | **WCMS 3** |
| Our people | —> | Contacts |
| People profiles | —> | Profiles |

In WCMS 3, some pages might not appear in the main navigation because the “Place in site hierarchy” box is unchecked. They can be added to the site hierarchy by checking the box through the page’s Edit tab > Menu Settings > Place in site hierarchy.

Note: WCMS 3 sites automatically create new menu items that may not need to be moved (eg. Opportunities, Projects).

1. Check if a site footer exists on the original site. Please reference [How to remediate site footers](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-menu-order) for in-depth instructions.
2. Review the content list from the spreadsheet and view **each page** side-by-side, comparing the two versions. We recommend split-screen during this process.
	1. To find a page:
		* WCMS 2: My Workbench > Create/Manage Content > Content type > Search the title
		* WCMS 3: Dashboard > Content List > Search the title of the page
	2. Ensure the WCMS 3 page leads to the same WCMS 2 page.
	3. Be aware of the **known issues** and **make corrections** to any discrepancies so the WCMS versions are the same. **Check both the edit and layout tab in WCMS 3**.

Embedded content types (e.g. CTA, facts and figures, timelines), migrate as blocks in WCMS 3. Remediate them when found on other content types. Standalone image galleries are remediated. See below to read details on how to remediate each content type.

1. Test every link found on each page. Both the WCMS 2 and WCMS 3 sites should lead to the same link. **See below for full instructions**.
2. Note all the issues and corrections on the comparison sheet and use **|** to separate them.
3. Let your supervisor/website lead know that the comparison check is complete. Ensure that the final version of the spreadsheet has been saved in their preferred destination.

**Be thorough! Attention to detail is a must!** If any unknown issues arise or anything that seems odd, let your supervisor know and keep examples of the issue (e.g. screenshots, screen recordings, the page), so the WCMS team can see the issue firsthand. Please send them to wcms@uwaterloo.ca

# Known issues

Remediation instructions can be found at [WCMS 3 migration remediation training](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-migration-remediation-training). Contact wcms@uwaterloo.ca for additional support.

Errors may occur with specific content types, below are some common issues. Please check with the website lead about what remediation acknowledgment they would like on the spreadsheet.

|  |  |
| --- | --- |
| Content Type | Known Issue(s) |
| [Menu](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-menu-order) | * Menu items not in the correct order
 |
| [Site footer](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-site-footers) | * Site footer did not migrate over
* Site footer is missing content
 |
| [Contacts](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-contacts) | * Name for sorting purposes missing in Contact
* Contact listing image(s) did not migrate
* Contacts do not display personal CV link
* Contact profile link does not migrate and shows <no link>
 |
| [Profiles](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-profiles) | * Name for sorting purposes missing in Profile
* Broken image migrated to Profile summary field
 |
| [News, Blogs, and Event items](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-blogs-events-and-news-items) | * Broken image migrated into summary of Blog, News item, or Event
* News item, Blog posts, Event items audience terms may be missing
 |
| [Expand and collapse](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-expandcollapse-content) | * Content from Expand/collapse migrated over but not expandable/collapsible
 |
| [Files](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-files) | * File did not migrate to WCMS 3
* Linked files direct to WCMS 2 version of site
* Linked files open to page not found
 |
| [Facts and figures](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-facts-and-figures) | * Facts and figures did not migrate
* Facts and figures missing information
 |
| [Image galleries](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-image-galleries) | * Image gallery did not migrate
* Image gallery migrates as a blank page
* Captions are missing
 |
| [Special alert](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-migration-remediation-training/how-remediate-special-alerts) | * Special alert missing or not appearing on specified pages
 |
| [Web forms](https://uwaterloo.ca/building-the-next-wcms/moving-wcms-3/how-remediate-web-forms) | * Web form preamble missing
* Web form ‘numbers’ field missing
 |

Some issues may be commonly seen across several different content types.

|  |  |
| --- | --- |
| Known issues | Remediation steps |
| Description of content exceeds the character limit | Manually edit the description of content to fit the character limit |
| Missing summary or description of content | Manually added |
| Missing image | Manually download and upload the image(s) |
| URL link directs to WCMS 2 version of site | Manually correct and create internal link ([How to add Link text](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-how-documents/how-add-link-text)) |
| HTML code remains in description of content, summary, or additional information field | Manually remove/replace HTML |

## Links

### **Internal links**

An internal link leads to a page within the same website. After migration, some links may lead to the WCMS 2 version of the site due to external link usage, which is unwanted. The link must be changed to direct internally to WCMS 3. [How to add Link text](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-how-documents/how-add-link-text)

If the WCMS 3 version cannot be found, it means the WCMS 2 version may be unpublished and did not migrate – notify the website lead or add it to the spreadsheet as an additional note.

### **External links**

An external link links to a page outside of the website, **including other Waterloo sites**. Leave the link as is, making sure that both links lead to the same page.

### **Broken Links:**

Check that each link leads to the correct and same page in both WCMS 2 and WCMS 3. If the link is broken, (e.g., Page not found), notify the website lead or add it to the spreadsheet as an additional note.

## Redirects

Redirects may shift if linked with nodes as node numbers may change during migration.

* Go to the redirects page on both the WCMS 2 and WCMS 3 versions of the site and compare. Correct them if they do not match.
	+ Note: only site managers have access to redirects in WCMS 3.
	+ [How to create a Redirect](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-how-documents/how-create-redirect)
* Some pages redirect to themselves. However, this will incorrectly redirect to the homepage. In this case, remove the redirect.

## Call-To-Action (CTA)

CTAs have their own pages In WCMS 2 but are a block in WCMS 3. The **content report** from WCMS 2 may show CTAs which are published but have not been embedded on other content types. Remediate the CTAs individually as they appear on other content types.

In some cases, CTAs may not migrate or may migrate with missing links:

* If a **CTA has not migrated**, manually recreate it in WCMS 3, ensuring parity with the original WCMS 2 CTA.
* If the CTA **migrated with a missing/incorrect link**, manually add the link from the WCMS 2 CTA to the WCMS 3 CTA.

CTAs can link to external pages, internal pages, internal files, and mail addresses. For more information review [How to create a Call to Action](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-how-documents/how-create-call-action-cta).

## Images

**Missing images**

Images may be missing on a page but correctly migrated over. To determine if the image exists:

1. From the administration bar, select **Workbench**, then select **My Dashboard**.
2. In the **Site management menu**, select **Manage all media**.
3. Search for the image by media name or alternative text in **Media name** field.
4. Select **Filter**.

If the image cannot be found in the media library, manually download the image from the **WCMS 2 site**and upload it to the **WCMS 3 site**.

1. In the **Copy text**box, place your cursor where you would like the image to appear and select the **Insert from Media Library** button.
2. In the **Image**tab, select **Choose file** and select the image.
3. **Alternative text**can be found on the **WCMS 2 site**by selecting **New draft**, right clicking the image, and selecting **Image properties**.
4. After saving the image, make sure the correct image is selected and select the **Insert selected** button.

**Misaligned images**

If the image is misaligned, select **Edit media** next to the image in the **Copy text**box and select the correct alignment.

**Additional information:**

* If alternative text and other image specifications are not applied after saving, open and close the **Source** button in the top left of the toolbar before saving to fix this issue.
* Compare the images on both sites to ensure parity. If further edits are required, repeat the above steps, and make the necessary changes.

# Resources

* [WCMS 3 How-to-documents](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-how-documents) to review how to use features on WCMS 3.
* [WCMS 3 Remediation training](https://uwaterloo.ca/web-resources/wcms-3-users/wcms-3-training-and-support/wcms-3-migration-remediation-training) to review the most common migration issues and their remediation steps with pictures.
* wcms@uwaterloo.ca is the WCMS support inbox.
* [List of current WCMS 3 sites](https://uwaterloo.ca/web-resources/wcms-users/wcms-sites)